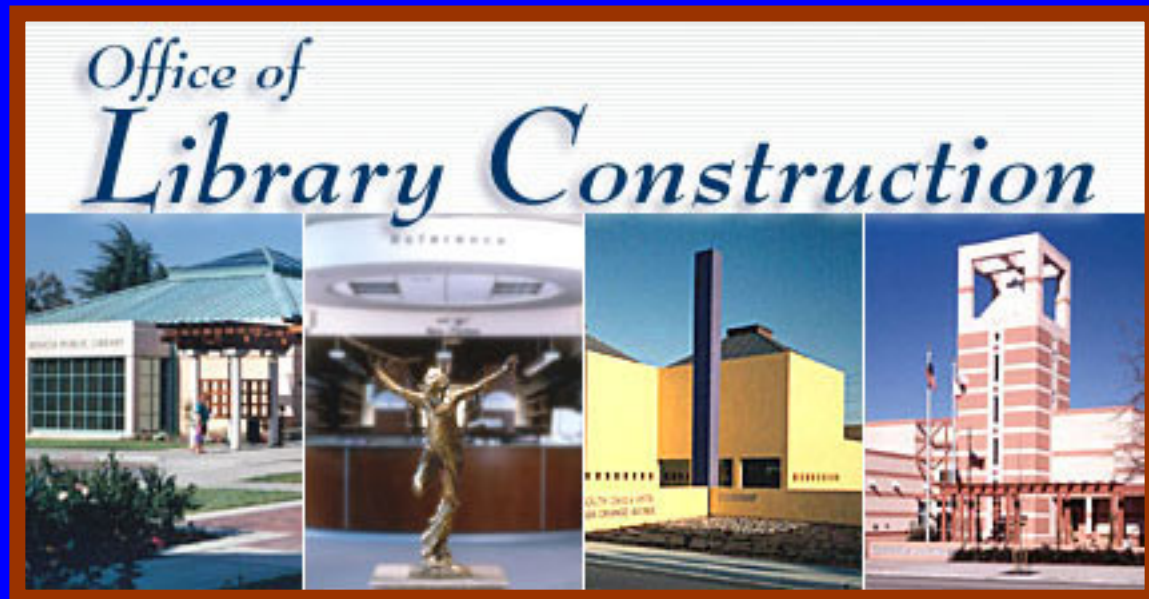# How To Apply for a Library Bond Act Grant

Presented by

California State Library's

Greetings & Invitation to Apply

- Dr. Kevin Starr
  California State Librarian

- California Public Library Construction & Renovation Board

Office of Library Construction (OLC)

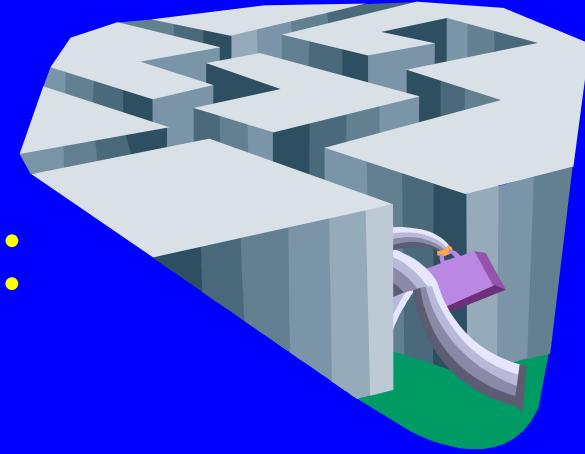- Administrative Division of the California State Library

- Administers Library Bond Act (Ed Code Section 19992)

Housekeeping

- Restrooms
- Telephones
  - Cell phones – please don't…
- Breaks: 15 min.
  - 10:00 a.m. & 2:50 p.m.
- Lunch 11:30 am. – 1:00 p.m.
- End workshop: 4:30 p.m.

- Workshop Materials
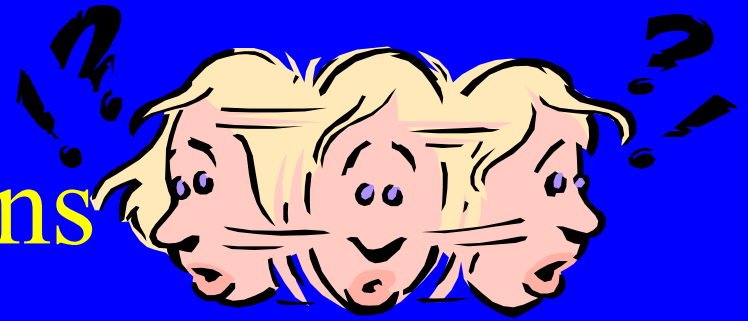 - Handouts
  - Power Point on Web site

Agenda Review:

- Morning:
  - General Requirements
  - Project Identification & Planning
  - Site Information
- Afternoon:
  - Needs Assessment
  - Library Plan of Service
  - Joint Use Agreements
  - Library Building Program
  - Architectural Plans & Studies
  - Project Budget & Finances

Questions

- General Questions Only
  - Time is limited today
  - At End of Each Section

- Project-Specific or In-depth
  - At breaks
  - After 4:30 p.m.
  - Call us Mondays or Fridays
    - OLC staff "on-call"

OLC Web Site: www.olc.library.ca.gov

- Staff Contacts by Activity
- News Flash E-Mail Alerts
  - Subscribe/Unsubscribe
  - Archive of All Messages
    - Searchable by Keyword
- Calendar
- FAQ
- Regulations & Bond Act
- Planning Assistance
  - Links to other Web sites

Workshop Goals

- Reduce Ineligible Applications

  – Close to 1/3 Ineligible Last Time in the First Cycle!

- Understand All Requirements

- Understand Importance

- Improve Competitiveness

Why Are Requirements Important?

- Improve Quality of Planning
- Improve Application Quality

- Basis of Staff Review

- Board Grant Award decisions

  - Based on Bond Act

- Best Investment of State Funds

- Best possible Library Buildings

Program Requirements

- These must be <u>read together</u>:
  - Library Bond Act
  - Title 5 Regulations
  - Title 24 Regulations
- Regulations make the law specific
- Result:
  - Program requirements in the Bond Act aren't repeated in the Regulations

What's Considered to Be a Regulation?

- Title 5 Narrative Text
  - Ed. Code sections 20430-20444

- Listed Supporting Documents

- All Appendices
  - Application Form
  - Joint Use Cooperative Agreement
  - Community Library Needs Assessment
  - Library Plan of Service
  - Library Building Program
  - Lease & Lease-Purchase Agreements

Regulations = Administrative Law

- Everyone must comply
  - State Library
  - Board
  - Applicants

- Administrative Procedure Act
- Fair & Equitable process
- Timely Implementation

DISCLAIMER:

This presentation is intended to assist potential applicants for Library Bond Act grants.

The application process is governed by the Bond Act and its regulations.
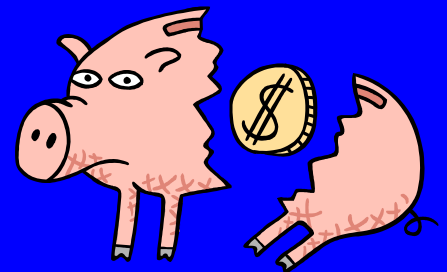
Statements of Office of Library Construction staff do not alter the requirements of the Act or the Regulations.

General Application Requirements
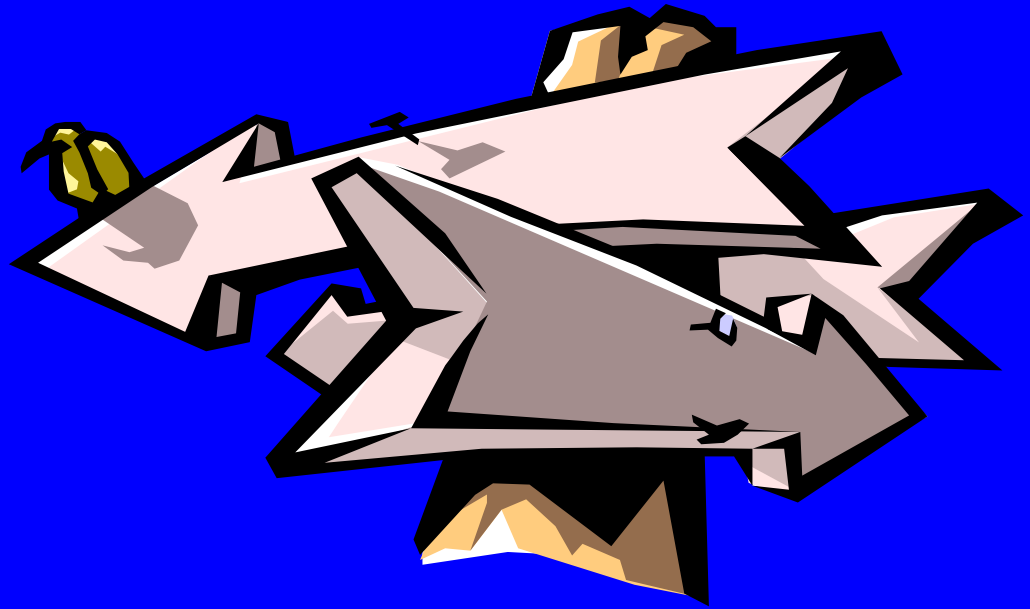
Application Deadlines

- 1st Deadline: June 14, 2002
  - $150,000,000

- 2nd Deadline: March 28, 2003
  - $110,000,000

- 3rd Deadline: January 16, 2004
  - All remaining funds
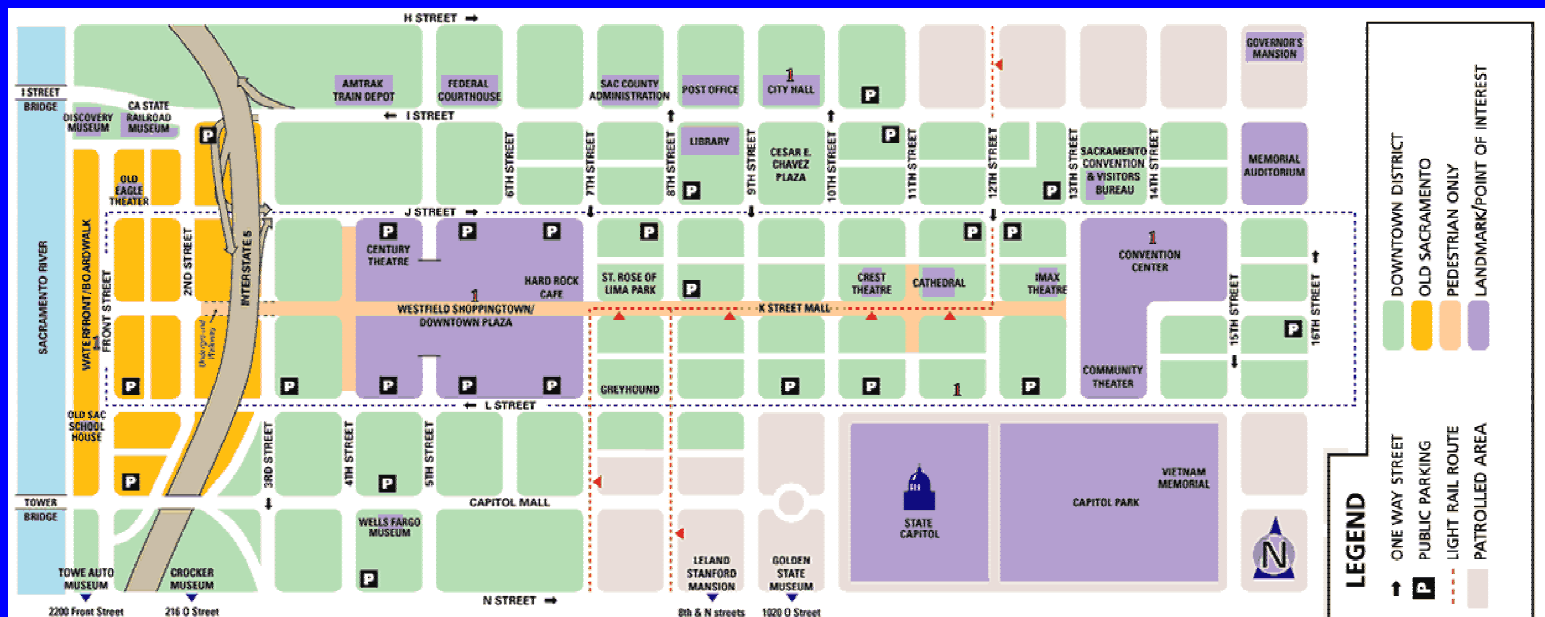
Submittal Location

- Send All Applications to:

    Bond Act Fiscal Officer

    Office of Library Construction

    1029 J Street, Suite 400

    Sacramento, CA 95814-2825

Ineligible Applications

- Received after the Deadline
  - 5 p.m. on Deadline Date
  - Exceptions can't be made (law)
- Delivered to Wrong Location
  - NOT main State Library
  - NOT Library & Courts II
- ANY required Documentation is:
  - Missing
  - Inaccurate
  - Incomplete
  - Not Signed
  - Not in Compliance

Format of Submittal

- No required format

  - Housing is Applicant's choice
    - 3-ring binder
    - Box with dividers

  - Table of Contents
    - With sections and page #'s

  - Project name
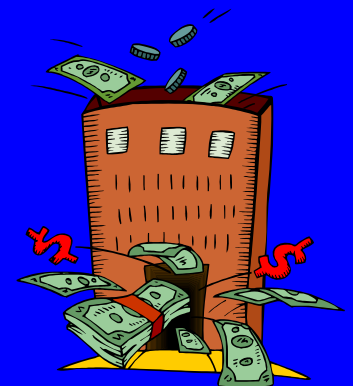   - On all supporting documents

Application Review Steps

1st   Determine Eligibility

- State Checklist
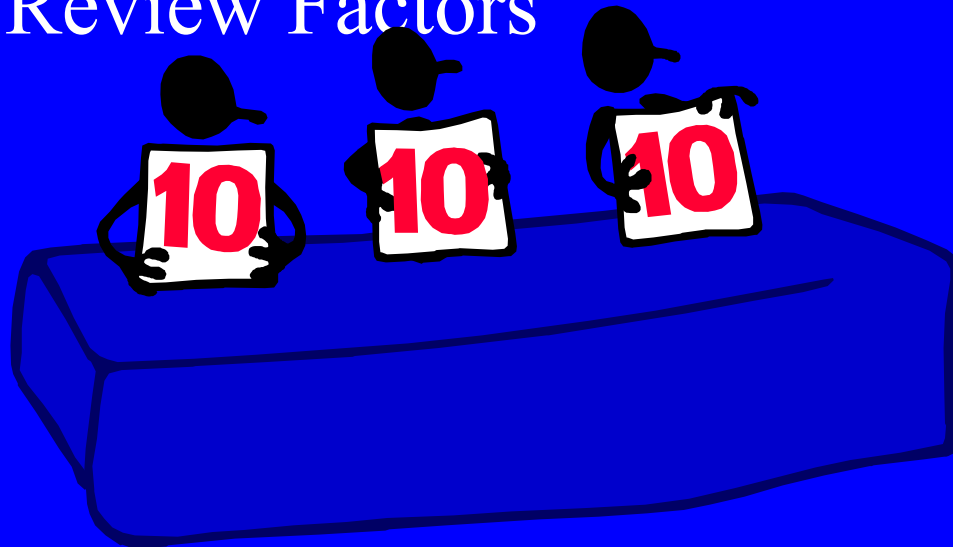
2nd   Review Applications

- Based on Bond Act Factors

3rd   Grant Award Decisions

State Library Staff Review of Applications

- Review Process may be Modified
- Only Eligible Applications
- Bond Act Priorities
- Bond Act Review Factors

Staff Review Continued…

- All Factors Considered Equal

- Unsure How Long it will take

- Cannot rush the Review

- Applicants will get Comments
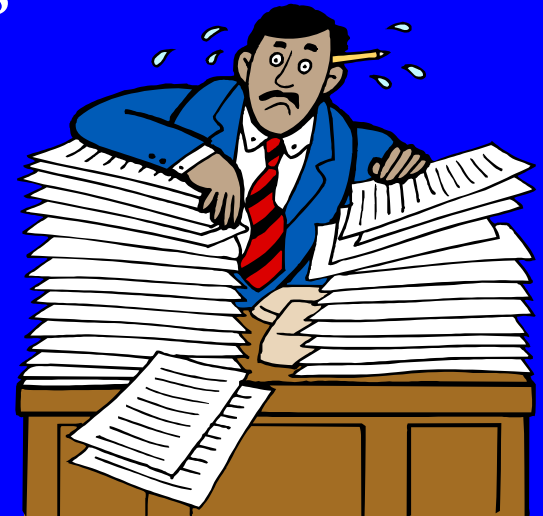
7 Bond Act Review Factors

- Needs of Urban and Rural
- Population Growth
- Age and Condition of Library
- Needs of Residents
  - Existing Library
  - Proposed Project
- Appropriate Use of Technologies
- Appropriate Site
- Financial Capacity to Operate
  (Only for New Public Libraries)

Application Submittals

- One Application per Project

- Multiple Projects per Jurisdiction

- Resubmitting an Application -

  - From 1st and 2nd cycles,
    may submit in next cycle

  - Need a New Application
    - Cannot "Reuse" previous one
    - Even if Information the same

Supporting Documents
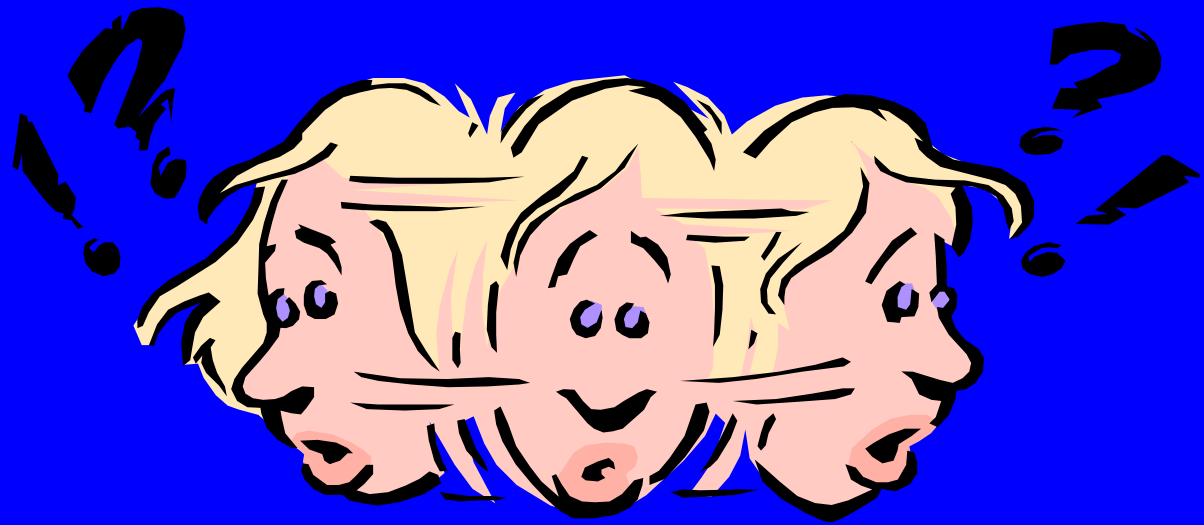
- Only 1 copy of each
  - Not the Original (you keep)
  - Identifier for presentation:

    📖 = A supporting document

- No attachments unless required
  - Only required attachments will be considered
  - Only conceptual plans are required – not beyond

The Application Form

California Reading and Literacy Improvement and Public Library Construction and Renovation Bond Act of 2000 Funds

Application Form Instructions:

- Instructions on Page 30

- Follow them carefully
  - Remain eligible!

- Be sure to complete all required sections

- Use only amount of space provided
  - We will not read extra text

Completing the Form

- PLEASE... NO HANDWRITTEN APPLICATIONS!

- 3 ways to complete the form:
  - On Paper w/ typewriter
  - The Excel version
  - The special Word version

Project Identification and Project Planning Information

Page 30
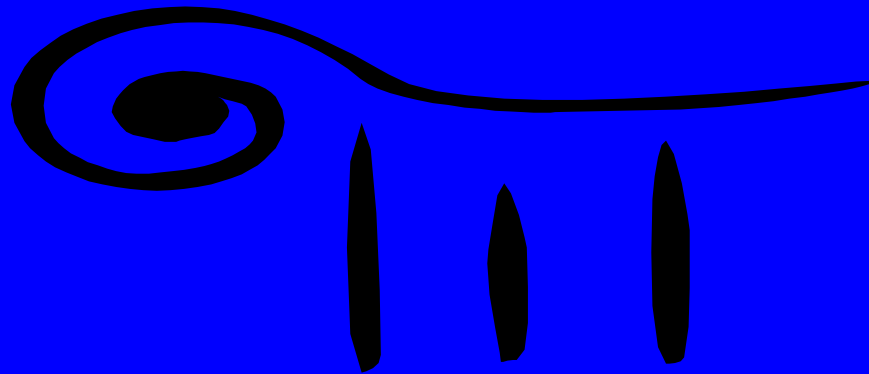
Project Identification
Page 30

- Official name of project
  - Think about this carefully!
    - Must use throughout project
  - Include jurisdiction name
    - "Eastside Albany Branch"
    - Not: "Eastside Branch"
  - Examples:
    - "Humboldt County Library"
    - Not: "New Main Library"

    - "Davis Library Expansion"
    - Not "library expansion"

Type of Applicant Jurisdiction Page 30

- Not the public library jurisdiction
- Must be:
  - City
  - County
  - City and County
    - Like San Francisco
  - Library District

Not Eligible to Apply…

- Public School Districts

  – Exception:

    - School District Library District

- Joint Powers Authorities (JPA)

  – JPA may not apply

  – Eligible party to JPA may apply

- AG Opinions on Web site

Grant Applicant Name
Page 30

- Legal name of the jurisdiction that will <u>own the building</u>

- Multipurpose Projects:

  - Legal name of jurisdiction owning library portion

Names & Contact Info
Page 30+

- May not know all at application
  - E.g., Construction Manager

- Not all will apply
  - Haz Mat Consultant

- OLC staff may have Questions
  - Library Building Consultant

- Insert "n/a" if it doesn't apply

Project Coordinator
Page 30

- For State contact purposes

  - Who can make decisions?
    - Administrative control

  - Who knows the project?

  - Who's most accessible?

Operating Library Jurisdiction
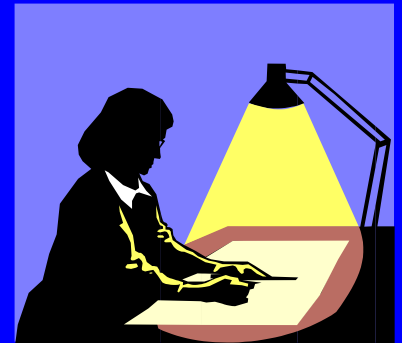## Page 31

- Legal name of library that will <u>operate</u> the public library

  - May be the applicant

  - May be a different agency

Project Architect
Page 32

- Providing:
  - Construction cost estimate
  - Conceptual plans

- Be sure they are licensed –
  - California license #

- May change architects later

Stay Calm…
Page 33

- Complicated looking page, but…

- Provides the project basics
  - Type of project
  - Priority
  - Size of project (Square Feet)
  - Etc.

- Guides Applicant & OLC Staff
  - Knowing what parts to complete
  - Staff review of Application Form

- Participant Exercise* – Page 33

Type of Project
Page 33

- Two Categories of Projects*

  – New Public Library

  – Existing Public Library
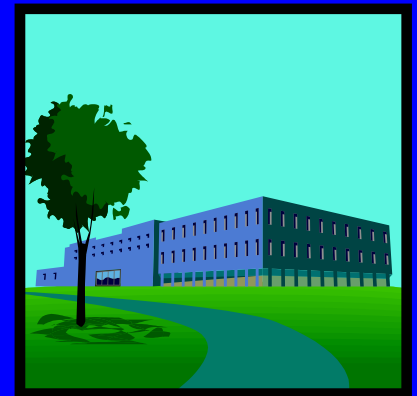
New Public Library
Page 33

- This category includes:
  - Construction of a new public library building

  - Conversion of an existing building into a new public library building:
    - Without an Expansion
    - With an Expansion

Existing Public Library
Page 33

- This category includes:

  - Remodeling an existing public library building

  - Remodeling & expansion of an existing public library

Remodeling & Conversion Projects Must…
Page 8

- Upgrade electrical & telecommunications systems

  - To accommodate Internet and similar computer technology
  - Required by the Bond Act
  - Made specific in regulations

What Must the Upgrade Include?
Page 8

- Electrical and Data systems
  - Dedicated electrical circuits:
    - All computers
    - All peripherals
  - Data connections to be:
    - Copper
    - Fiber optic
    - Wireless
  - Minimum Category 5 cabling:
    - Data Connections your choice
    - Transmit at least 100 Mb/Second

Bond Act Priorities

- Two categories of projects
  - New public libraries
  - Existing public libraries

- Each category has:
  - First priority
  - Second priority

Priorities for Existing Public Libraries

- 1st Priority:

  – Site within attendance area of a public school with inadequate infrastructure for technology

  – Does not require Joint Use
    - No Cooperative Agreement

- 2nd Priority
  – All others

Which School Can You Choose?

- Only K-12 Public Schools

  - Not private schools

  - Not home schools

  - Not community colleges

- <u>Any</u> Public School
  - Elementary

  - Middle / junior high

  - High school

- But site must be within the school's attendance area

Inadequate Infrastructure Means…
Page 3

- No school buildings have incoming telecommunication connection greater than 512K bps

- Recent School Survey
  - Contact schools for speed
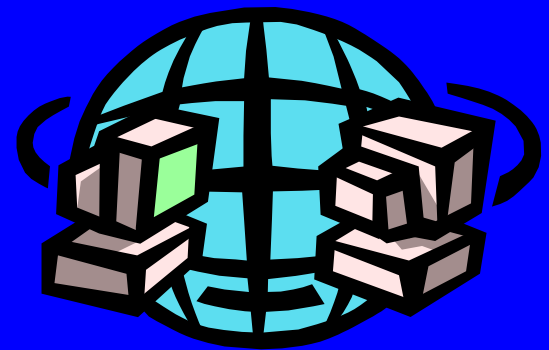
Certification of Inadequate Infrastructure
Page 12

📖 Letter from public school superintendent verifying:

1. Library site is within the school's attendance area

2. None of the buildings has telecommunication connection greater than a 512K bps

📖 Map showing library site within public school attendance area

Priorities For:
New Public Libraries

- 1st Priority
  - A joint use project
    - A cooperative agreement
      - With one or more <u>public school districts</u>

        and

      - The <u>agency</u> that will <u>operate</u> the public library

- 2nd Priority
  - All others

Joint Use Projects
Page 33

- Two types of joint use projects

    – Co-located library

    – Joint venture project
        - Check which type
        - May have more than one

- Details this afternoon

Remodeled vs. Expanded SQ FT Page 33

- Need to break out for two types of projects:
  - Conversion & Expansion
  - Remodeling & Expansion

- List each type of square footage separately:
  - Used later to calculate
    - "Normal public construction costs"

Field Act Applicability Page 33

- Specific building codes that apply when public school students are required to be present in the building

- Code citation is on page 3

State Architect Says Field Act Applies If:

- "Joint use" project:

  - Is located on property owned by a public school

    OR

  - Requires more than 24 K-12 students to attend at one time for "educational purposes"

- Office of Public School Construction (OPSC)

Field Act Determination

- Not part of Library Bond Act or Title 5 Regulations

- Check with your school district

- Check with your jurisdiction's attorney

- Plans Review by State Architect
  - Will affect Project Timeline
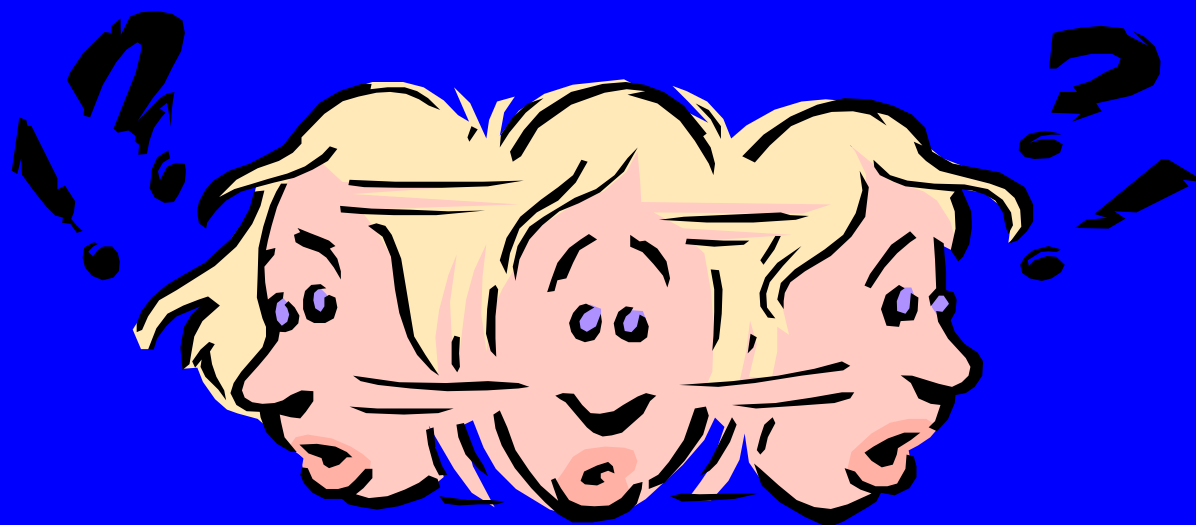
Multipurpose Buildings
Page 34

- Definition:
  - A multi-occupant facility
    - Part is used for a public library
    - Part is used for other purposes

- It's multipurpose if…
  - <u>Any</u> space ***isn't*** devoted to delivery & support of public library direct service
    - Library Bond Act requires

When Is Co-located Also Multipurpose?

- It's a Judgment Call
  - Be able to Justify
  - Conservative is safer

- Examples:
  - Classroom
  - Computer Center
  - Teacher's Lounge
  - Staff Offices

Other Examples of Multipurpose

- What about these?
  - DMV Offices
  - City Council Chambers
  - County Records Storage
  - Bookstores & Cafes

    - Friends of the Library
  - Copy Centers

- Consult with Staff if needed

Multipurpose Buildings
Page 34

- Three types of spaces:
  - Public library
  - Other than public library
  - Common areas

- This page is a worksheet
  - Assistance in calculating eligible project cost for common areas
    - Pro Rate Common Areas
  - Consult with Staff if needed

7 Bond Act Review Factors

- Needs of urban and rural
- **Population growth**
- Age and condition of library
- Needs of residents
  - Existing library
  - Proposed project
- Electronic technologies
- Appropriateness of site
- New public libraries: financial capacity to operate

Review Factors

- One of the 7 Bond Act Review Factors –

  - Higher growth rate means a higher ranking for the project

  - Historical growth
    - Percent change 1980 to 2000

  - Projected growth
    - Percent change 2000 to 2020

  - If Joint Use –
    - Also Student Population

Population Growth
Page 35

- Count only people…
  - Within official boundaries of applicant jurisdiction
  - Within library service area
  - Other public library service areas <u>only</u> if a contract exists

- Cite source of figures:
  - Use most <u>current</u> source available

Existing Library Facility Square Footage
Page 36

- If more than one facility being replaced:

  – Add the gross square footage of each facility together

- If no existing library facility:

  – Enter "0"

- If leased facility:

  – Enter "0," unless lease total duration is 20 years or more

When Is a Leased Library an Existing Library?

- Only if the <u>duration</u> of the lease is <u>20 years or more</u>

- If not 20 years:
  - Enter "0" for existing library square footage
  - Enter "N/A" for <u>age</u> of existing library
  - Enter "N/A" for <u>condition</u> of existing library

Word to the Wise…
Page 36

- About Narrative "Boxes"

  – Only use available space
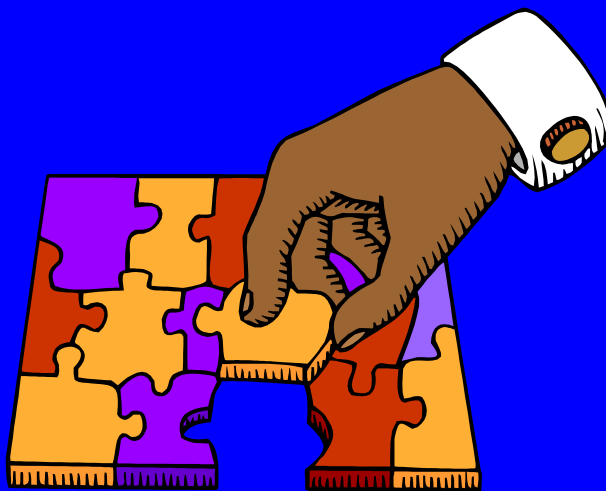
  – Every word counts

  – Brief, but to the point

Library Facilities Master Plan

Page 36

- How does *this* project fit in with the jurisdiction's overall plan?

7 Bond Act Review Factors

- Needs of Urban and Rural
- Population Growth
- Age and Condition of Library
- Needs of Residents
    - Existing Library
    - Proposed Project
- Appropriate Use of Technologies
- Appropriate Site
- Financial Capacity to Operate
    (Only for New Libraries)

Age & Condition Review Factor

- One of the 7 Bond Act Review Factors –

  – No existing library =
    high rank

  – Older existing library = higher rank

  – Existing library with recent structural
    renovations / expansions =
    lower rank

Age of Existing Library
Page 37

- The year it was built
- More than one building being replaced: list the <u>oldest</u>
- If Co-Located -
  - Same for school library
- If Leased -
  - Enter "N/A" (unless more than 20 years)

Condition of Existing Library
Page 37

- Date of most recent:
  - Structural renovation
    - Load Bearing Elements
  - Expansion of building

- More than one building being replaced?
  - List the <u>oldest</u>
- If Co-Located library -
  - Same for school library
- If Leased -
  - Enter "N/A" (unless more than 20 years)

Visual Record of Existing Library(s)
Page 24

- 📖 Must be submitted :

  – If there is an existing public library

  – Co-Located Library:

    • Do for existing school library, if there is one

Visual Record Requirements

- Visual record can be photographs or video
  - If electronic, check with Staff re: compatibility

- Show whatever is needed to document condition of library

- All photos and videos must be labeled with:
  - Project Name
  - Applicant Name